

Job Aid:

How to Set Up a Master Blanket Purchase Order from a Migrated Comm-PASS Contract

This Job Aid shows a Basic Purchasing user how to:

- Search for migrated Departmental contracts
- Review and Download Attachments
- Clone migrated (vCurrent) Blanket
- Delete and/or add line item(s)
- Add Vendor to Single Vendor Blanket OR
- Add Vendor(s) to Distributor Blanket
- Submit PO for Approval and/or Send PO to Vendor

Of Special Note:

All contracts previously in Comm-PASS were migrated to COMMBUYS. In COMMBUYS, a contract equals a Master Blanket Purchase Order (MBPO) or Blanket, the terms may be used interchangeably. You must be a Basic Purchasing user with appropriate privileges in the organization that owns the migrated document to perform most of the steps outlined below. Departments use three types of Vendor (Seller) Contracts, and this Job Aid will focus on the first two.

1. Master Blankets with one vendor (awarded contractor) and a catalog of line items specific to that vendor. These blankets often referred to as “**single-vendor blankets**,” are ideal for contracts where pricing is fixed and does not require a quote. This setup requires you to create a separate Master Blanket for each awarded contractor.
2. Master Blankets with multiple vendors listed as distributors under one placeholder vendor. (These blankets often referred to as “**distributor blankets**” can be “Solicitation Enabled” in order to support issuing Bids to get price quotes from the contractors, and then placing orders with the quote winner(s). This setup requires you to create one Master Blanket that would contain all the awarded contractors).
3. Punchout (G2B Blanket) – this catalog type requires OSD / Periscope involvement to establish as it is an integration with a vendor’s order management system and online shopping site

Directions

1. Launch the COMMBUYS website by entering the URL [commbuys website](#) into the Browser.

Enter your Login ID and Password.

2. To Search for migrated Blankets, Click on the magnifying glass on the Header Bar to display the Advanced Search window.

3. Select the radio button for Contracts/Blankets

4. Use any of the open fields to search for the contract you are looking for.

- The **Contract/Blanket #** is the COMMBUYS Blanket numbering scheme – not the Comm-PASS contract number
- ***To search for the Comm-PASS contract number enter it into the Contract/Blanket Description field***
- If you are seeing too many results, including those with “v#” in the file name where “#” is a number, filter your results by selecting **Header Major Status** and choosing, “**Sent**” for a contract that was previously awarded in Comm-PASS, or “**In-Progress**” if it was a draft at the time of migration.

Click **Find It** after entering information

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If you need to refine your search results after searching, press the “+” icon next to Advanced Search to display and edit your search criteria.

5. Select the “vCurrent” Contract/Blanket # link

Result Columns:

- Contract/Blanket #: #####-vCurrent is the converted contract record from Comm-PASS. Cannot be used to purchase from in COMMBUYS.
- Description: Department Contract number from Comm-PASS – you can add the contract title to this field to make it easier to find for contract users.
- Vendor Name: Conversion Vendor (all vCurrent Blankets will have the main Vendor name as Conversion Vendor, with all contract Vendors listed as distributors in the Blanket)
- Organization – Name of the organization who owns the MBPO
- Status 3PS- Sent (Active MBPO) In-Progress is a draft MBPO that has not yet been approved or sent / finalized for use.
- Begin Date: Start date of contract
- End Date: End date of contract

6. The Attachments tab is where you will find all key contract information: In this example, we see the RFR and contract amendments. All attachments will need to be uploaded to the new Purchase Order(PO)

- The attachment C101576-vCurrent_OD.xlsx, is the “Orphan Data” attachment. Every converted contract from Comm-PASS will have such an attachment and it will always be the last attachment listed.
- This orphan data file contains information that did not have a field in COMMBUYS, and therefore was kept as a separate record for the contract.

Click to open the orphan data file attachment, and Download all Attachments

7. This panel is displayed when you click the OD file link.

8. The Master Blanket Purchase Order # VCurrent Information displays. This page is broken into headings:

- Header information: general contract information - organization, department, and location; contact instructions, attachments; status. This is also where the appropriate **Type Code** displays to designate the type of contract, and the **Solicitation Enabled** checkbox that determines whether this is a catalog vs. a blanket used for future Bids for pricing not specified in a catalog.
- Attachments: all attached files and templates for the MBPO
- Primary vendor information: Conversion Vendor holds the place as a primary Vendor for the departmental contract.
- Master Blanket Vendor distributor list: since the Vendors are not active COMMBUYS Sellers yet there is no distributor listed
- Master Blanket controls: being and end date for the contract, as well as who can use the contract
- Item information: converted information was placed in the line item description and will need to be corrected by the department
- Approval Paths: displays the approvers who were on the approval path for the creation of the MBPO

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Clone the PO once for each Vendor to create single-vendor blankets.

Clone the PO only once for all vendors to create a distributor blanket.

9. This screen displays the Cloning result.

Notice a NEW Master Blanket Purchase Order Number is generated

You are able to edit any information fields on this panel

Add the contract title to the contract number in the short description field

Under Type Code, select

- “Non-Statewide / Limited User Contract” for departmental contracts.
- “Statewide Contract” for designated and OSD-issued statewide contracts. Note that statewide contracts are subject to policy considerations outlined in the [OSD COMMBUYS Policy](#) document.
- Enter name, phone and email address information in Contact Instructions field.
- Click Save & Continue

See Note below

Note:

For a single-vendor blanket with specific pricing for a single vendor, you may select “Direct Release” if you would like the order (PO) to go directly to the vendor once the associated requisition is approved, or “Standard Release” if you would like to purchaser listed on the blanket to be the person releasing all orders (POs) to the vendors on the blanket after the approvals have been completed.

If the blanket is distributor blanket and will serve as a multi-vendor contract used for conducting Bids to get pricing for specific orders, be sure to select **Solicitation-Enabled** and instruct users to create **Solicitation Enabled release requisitions** when ordering from this contract. Distributor- blankets require “Standard Release” for release type.

In some cases, departments may choose not to check off “Solicitation Enabled” on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing. 10.

10. Click on the Items tab

Delete the existing item and / or add additional items.

Click Save & Continue

11. The item information section is used to define specific products or services, their UNSPSC codes and pricing information. Blankets of all types, single-vendor and distributor, are required to have at least one “item” in order to function.

In a single-vendor blanket, if pricing varies based on a product attribute (e.g. size, color, etc.), you may create separate items with their distinct pricing.

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If you need users to be able to enter quoted prices, leave the unit cost field blank and instruct them to enter pricing and add to the description on their release requisitions so that the vendor knows what they are ordering.

If a distributor blanket, you have to set up at least one item that would cover the products/services available from all the contractors. Just as explained above, you should leave the unit cost field for those items blank.

12. Enter Item Description, Quantity, Unit Cost

Choose a **UOM** (Unit of Measure) from drop down

Use the eyeglass icon to open a pop up UNSPSC search and select applicable UNSPSC Code(s).

If this is a distributor blanket, the Description should be specific enough to determine what you / the purchaser are asking the vendor to provide quotes on and it is recommended that it indicate that users should create a Solicitation Enabled requisition when ordering this item. Users ordering this item will have the ability to append text to the Description on their Solicitation Enabled Release Requisitions.

13. Use the pop-up window to search for UNSPSC

- Enter keyword or select family segment
- Select radio button for best code

Click Save & Exit

14. Finalize the item by adding the 4-digit Commodity-EPP extension.

NOTE: The commodity code is incomplete unless the Commodity-EPP field is populated.

View final item added

Click Save & Edit

15. The layout shown is how COMMBUYS displays items and services (including those who have not logged in). To edit an item you have already entered, click the item number link.

16. Click the Vendor Tab

Click the Look Up & Add Vendor button

17. Enter your Search criteria to find the contract vendors.

If this is a distributor blanket, use Vendor ID 99000000, to find the Conversion Vendor, who will be the placeholder vendor for the blanket.

18. Click the radio button for the desired Vendor. If you do not see the vendor you are looking for, try searching again or contact the vendor to see whether they are registered. The vendor must register with COMMBUYS in order to be added to a blanket.

Then click the Add Vendor button.

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If you are creating a single-vendor blanket, skip to Step 22.

19. If this is a distributor blanket, you will use Conversion Vendor (COMMBUYS Vendor ID 99000000) as your general Vendor, in the step above. The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all the awarded contractors as distributors.

Click on the Distributors tab to add vendors on the contract.

20. If this is a distributor blanket, click Lookup & Add Vendor Distributors

21. If this is a distributor blanket, a Vendor Search pop up window will display

Search for the Vendors on the contract

Click Save & Exit once complete

22. On the Control tab enter the Master Blanket Contract Begin and End Date

Click Save & Continue

23. Next add the organization(s) that can use the MBPO in accordance with the negotiated contract.

If your organization is the only one authorized to use the contract, no action is required on this tab.

If more than one organization is authorized to use this blanket:

- Check off the “Cooperative Purchasing Allowed” box, and then
- Select the organization by clicking on the eyeglasses to search for the organization and department. You can also set a dollar limit or minimum order amount if the contract has dollar stipulations.

If this is a designated or OSD-issued statewide contract and all organization in COMMBUYS can purchase from it:

- Check off “Cooperative Purchasing Allowed” box, and then
- Add “ALL ORGs” as the organization. Note that statewide contracts are subject to policy considerations outlined in the [OSD COMMBUYS Policy](#) document.

Click Save & Continue

24. Click to the Attachments tab

Here you will need to upload all attachments relevant this the MBPO

Click Add File

25. Click Choose File

The Name* will auto populate from the name of the file, but you can modify it. The contents of this field show up as the underlined link for the file, so you can make the text of the link more descriptive. Additional detail can be provided in the Description field, which becomes visible when a user goes to download the attachment.

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Click Save & Exit

Note: Each attachment will need to be added separately.

26. Click on the Summary tab

Review the PO content

Click Submit for Approval. The Master Blanket PO will be routed through any approvals required and may be Returned to you to re-open, edit and resubmit if approvers have disapproved with comments about changes needed.

Note: The MBPO will not go live automatically after all approvals have been completed. After all the approvals, the MBPO will come back to you to be "Sent" to the vendors.

27. Once approvals have been granted, open the MBPO.

At the bottom of the summary tab select either "Send Email and Notify Vendor" or "Set to Printed Status." Use "Send Email and Notify Vendor" if this is a newly issued contract that the vendor needs to be made aware of. For contracts previously issued in Comm-PASS, you may choose "Set to Printed Status," which does not notify the vendor that the MBPO has been created.

Click Save & Continue

The Blanket PO into Sent status thus making it available for purchasing.

From this point onward, most changes will require a Change Order to be created, submitted, approved and applied to the PO.